

## STATE BOARD OF EQUALIZATION DUTY STATEMENT

CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
<b>Business Taxes Administrator II</b>		<b>Supervisor, Civil Fraud Audit Section/Specialized Bankruptcy</b>	
UNIT/DISTRICT/LOCATION		POSITION NUMBER	
<b>Legal Department - Investigations &amp; Special Operations Div</b>		<b>290-472-4331-002</b>	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
<b>Supervisory</b>	<b>S01</b>	<b>4C</b>	
FINGER PRINTS REQUIRED		SUPERVISION EXERCISED	
<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		<b>Yes</b>	

### Job Requirements

#### Knowledge of:

- Organization of the Board of Equalization.
- General compliance and collection principles, procedures, and techniques.
- Specialized collection and compliance procedures and practices used in tax administration, with particular emphasis on cases involving bankruptcy.
- General accounting and auditing principles and procedures, and business law.
- Specialized practices and procedures used in tax auditing.
- Provisions of the tax laws, rules, and regulations administered by the State Board of Equalization, and related legal opinions and court decisions with particular emphasis on cases involving bankruptcy.
- Principles, practices, and trends of public and business administration.
- Principles and techniques of personnel management, supervision, and employee-employer relations.
- The State Board of Equalization's equal employment opportunity objectives.
- A supervisor's role in the equal employment opportunity program and the processes available to meet equal employment opportunity objectives.
- Departmental administrative policies, goals, and organizational structure.

#### Ability to:

- Analyze data, evaluate situations accurately and apply the above listed knowledge effectively.
- Plan, organize, and direct the work of staff engaged in specialized tax compliance and auditing work.
- Develop the skills and abilities of subordinate staff, and motivate subordinate staff to develop group and organizational goals.
- Establish and maintain cooperative working relationships with those contacted in the course of work, including other governmental agencies.
- Resolve complex supervisory and managerial problems.
- Work cooperatively with persons subject to tax administration.
- Gain and maintain the confidence and cooperation of Board staff, along with other State and Federal officials.
- Communicate effectively, both orally and in writing, and prepare clear, complete, and concise reports.
- Maintain confidentiality of personal and politically sensitive material.
- Work under pressure and manage projects for timely completion.
- Sit for extended periods of time at a desktop computer, and work in a high-rise building.
- Effectively contribute to the State Board of Equalization's equal employment opportunity objectives.

### Special Personal Characteristics

- Must be flexible and willing to adjust to changing assignments and priorities.
- Ability to work under pressure; work with confidential and politically sensitive material, and be able to communicate effectively, both verbally and in writing.
- Excellent organizational and strong interpersonal relationship skills.
- Proficiency in using a personal computer, including various software packages such as word processing, spreadsheets and data base programs for report writing, data analysis, and presentation.

## Statement of Position

Under the general administration of the Manager, Special Operations Division, the Business Taxes Administrator II manages subordinate units and staff involved in civil tax fraud audits, specialized tax compliance involving bankruptcy claims, and audit billing review work. Responsibilities include a broad range of technical and administrative duties. Specifically, this involves developing and interpreting uniform policies and practices for the division-wide business taxes audit program, and referrals to the Attorney General's Office for assistance with special collection procedures and mechanisms of various types of legal bankruptcy claims of a personal or corporate nature. Within assigned areas, the incumbent also provides expert assistance and consultation to BOE staff and management. Acts as an "Authorized Representative" of the Board.

**Candidate must be able to perform the essential job functions (\*) with or without reasonable accommodations.**

Percentage of Time Spent	Duties
35%*	Plans, organizes, directs, and evaluates specialized civil tax fraud audits, audit billing functions and assigned compliance and collection work on cases involving personal and corporate bankruptcy either directly or through subordinate supervisors.
35%*	Provides service and guidance to agency staff and the Attorney General on action(s) to be taken on complex bankruptcy cases or related issues. Advises and assists district staff in handling unusual or difficult collection activity on specific cases. Plans, directs, and evaluates special collection, compliance, and administrative policies and procedures related to bankruptcy to assure uniform treatment of taxpayers and conformity with the law. Responds to telephone calls and correspondence from taxpayers, their representatives, the Board Members' offices, elected officials, and the general public.
20%*	Consults with Board staff attorneys and/or Attorney General on pending collection-related litigation. Consultant to Board management, control agencies, enforcement agencies and other agencies in the department's bankruptcy collection program; prepare evaluations and reports to management and control agencies. Review bankruptcy filings, objections to legal claims, adversary proceedings and other lawsuits in which the Board is named as a defendant. Functions as Authorized Representative of the Board in bankruptcy claims.
5%*	Liaison with other agencies related to Board activities in bankruptcy cases. Represents the Legal Department for presentations before various legislative, industry, and consumer groups. Represents the Legal Department in presentations before various legislative, industry, and consumer groups, and serves as liaison with internal and external departments or agencies, Board Members, and the public.
5%	Other related duties as required (e.g. strategic program plan development, reviews audits and administrative reports for format and appropriate content documenting and reporting any discrepancies, evaluate performance of subordinate supervisors and review probationary and annual performance reports prepared by first line supervisors).

### **\*Essential job functions**

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*I have read this duty statement and fully understand my assigned duties.*

EMPLOYEE'S SIGNATURE

DATE

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*I have reviewed these duties with the above named employee.*

SUPERVISOR'S SIGNATURE

DATE